

China Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 196 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The China Data Center Market size is estimated at 4.27 thousand MW in 2025, and is expected to reach 8.26 thousand MW by 2030, growing at a CAGR of 14.08%. Further, the market is expected to generate colocation revenue of USD 4,011.7 Million in 2025 and is projected to reach USD 9,706.6 Million by 2030, growing at a CAGR of 19.33% during the forecast period (2025-2030).

Tier 3 data center accounted for majority share in terms of volume in 2023, Tier 4 is fastest growing segment

- Tier 3 data centers are the most preferred due to features such as on-site assistance, power, and cooling redundancy. The segment is expected to grow from 1,115.1 MW in 2022 to 1,874 MW by 2029 at a CAGR of 5.7%. These data centers are mainly chosen by companies for storing and processing business-critical data to cater to their growing business and scalability needs. There are around 110 Tier 3 data centers in the country, and around 37 upcoming data centers are under construction with Tier 3 specifications.
- Tier 4 data centers are the next most preferred by large businesses due to their performance, lower downtime, and 99.99% uptime. These data centers are relatively costly; however, the performance offered by them outweighs the price and supports the competitive and growing needs of large businesses. In 2022, the country had seven Tier 4 data centers owned by Princeton Digital Group and SpaceDC Pte Ltd.
- Tier 1 & 2 data centers are the least preferred due to their higher downtime durations, power and cooling redundancies, and on-site remote assistance. Since these data centers are relatively cheap compared to Tier 3 and Tier 4, small businesses and startup companies prefer them. Since Tier 1 & 2 data centers are the least preferred, stagnant growth could be seen during the forecast period.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

China Data Center Market Trends

Huawei, Apple, Xiaomi, Oppo, and Vivo offer cheap smartphones with high end features which attracts consumers to spend more on these products creating a high demand in smartphones in the country

- The number of Chinese smartphone users was 950 million in 2022, and the figure is expected to reach 1.8 billion by the end of the forecast period (2023-2029), registering a CAGR of 10.2%. The spread of 4G and 5G connectivity across the country has improved mobile communication, making smartphones a basic necessity for people.
- Chinese smartphone companies are offering affordable smartphones with high-end features, leading to an increase in smartphone users in the country. Around 50% of users replace their phones every 12-18 months, making companies innovate their phones frequently. Currently, the major market players are Huawei, Apple, Xiaomi, Oppo, and Vivo.
- This increase in smartphone users has positively impacted the growth of the data center market in the country. During the study period, when the number of smartphone users increased fivefold, the number of racks in data centers increased from around 70k in 2017 to 280k in 2021. This trend is expected to be witnessed during the forecast period as well.

Chinese government's "Broadband China Strategy coupled with increased fiber connectivity, boost the data centers in the country

- The Chinese government's "Broadband China Strategy," drafted in 2013 and implemented in 2015, is accredited for spreading broadband connectivity across the country, primarily in remote locations. In 2021, under this strategy, the broadband speed reached 100 Mbps for residential use in cities and 20 Mbps in rural regions. On the other hand, the broadband speed for commercial/industrial use increased from an average speed of 100 Mbps in 2015 to 1 Gbps in 2021. With further expansion of the fiber connectivity network, average speeds are estimated to rise significantly in the coming years.
- In order to provide high data speeds, the Chinese market increased the distance of laying fiber optic cables over the years. The deployment of optic fiber cable networks in the country registered a CAGR of 8.5% during 2017-2022. The deployment of fiber optic cables spurred last-mile internet connectivity in the country. As these cables offer better connectivity and higher bandwidths, most companies replaced them with traditional copper cables to offer better and upgraded services.
- Stable broadband speed, predominantly via fiber cables, is crucial for the expansion of data centers and their communication with other data centers and internet exchanges (IX). It has become common for companies to store their business's critical data in the cloud, colocation, and in-house. Within these storage locations, various services are provided to their customers across different servers. With the increase in the number of points of communication, it becomes critical to keep communication as fast as possible. Therefore, strong broadband connectivity across the country is expected to support the data centers to maintain 100% uptime during the forecast period.

China Data Center Industry Overview

The China Data Center Market is fragmented, with the top five companies occupying 17.92%. The major players in this market are China Telecom Corporation Ltd, Equinix Inc., GLP Pte Limited, Keppel DC REIT Management Pte. Ltd and Princeton Digital Group

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

(sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 MARKET OUTLOOK

4.1 It Load Capacity

4.2 Raised Floor Space

4.3 Colocation Revenue

4.4 Installed Racks

4.5 Rack Space Utilization

4.6 Submarine Cable

5 Key Industry Trends

5.1 Smartphone Users

5.2 Data Traffic Per Smartphone

5.3 Mobile Data Speed

5.4 Broadband Data Speed

5.5 Fiber Connectivity Network

5.6 Regulatory Framework

5.6.1 China

5.7 Value Chain & Distribution Channel Analysis

6 MARKET SEGMENTATION (INCLUDES MARKET SIZE IN VOLUME, FORECASTS UP TO 2030 AND ANALYSIS OF GROWTH PROSPECTS)

6.1 Hotspot

6.1.1 Beijing

6.1.2 Guangdong

6.1.3 Hebei

6.1.4 Jiangsu

6.1.5 Shanghai

6.1.6 Rest of China

6.2 Data Center Size

6.2.1 Large

6.2.2 Massive

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.2.3 Medium
- 6.2.4 Mega
- 6.2.5 Small
- 6.3 Tier Type
 - 6.3.1 Tier 1 and 2
 - 6.3.2 Tier 3
 - 6.3.3 Tier 4
- 6.4 Absorption
 - 6.4.1 Non-Utilized
 - 6.4.2 Utilized
 - 6.4.2.1 By Colocation Type
 - 6.4.2.1.1 Hyperscale
 - 6.4.2.1.2 Retail
 - 6.4.2.1.3 Wholesale
 - 6.4.2.2 By End User
 - 6.4.2.2.1 BFSI
 - 6.4.2.2.2 Cloud
 - 6.4.2.2.3 E-Commerce
 - 6.4.2.2.4 Government
 - 6.4.2.2.5 Manufacturing
 - 6.4.2.2.6 Media & Entertainment
 - 6.4.2.2.7 Telecom
 - 6.4.2.2.8 Other End User

7 COMPETITIVE LANDSCAPE

- 7.1 Market Share Analysis
- 7.2 Company Landscape
- 7.3 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 7.3.1 BDx Data Center Pte. Ltd
 - 7.3.2 Chayora Ltd
 - 7.3.3 China Telecom Corporation Ltd
 - 7.3.4 Chindata Group Holdings Ltd
 - 7.3.5 Equinix Inc.
 - 7.3.6 GDS Service Co. Ltd
 - 7.3.7 GLP Pte Limited
 - 7.3.8 Keppel DC REIT Management Pte. Ltd
 - 7.3.9 Princeton Digital Group
 - 7.3.10 Space DC Pte Ltd
 - 7.3.11 Telehouse (KDDI Corporation)
 - 7.3.12 Zenlayer Inc.
- 7.4 LIST OF COMPANIES STUDIED

8 KEY STRATEGIC QUESTIONS FOR DATA CENTER CEOS

9 APPENDIX

- 9.1 Global Overview

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 9.1.1 Overview
- 9.1.2 Porter's Five Forces Framework
- 9.1.3 Global Value Chain Analysis
- 9.1.4 Global Market Size and DROs
- 9.2 Sources & References
- 9.3 List of Tables & Figures
- 9.4 Primary Insights
- 9.5 Data Pack
- 9.6 Glossary of Terms

China Data Center - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 196 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2025-05-06"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com